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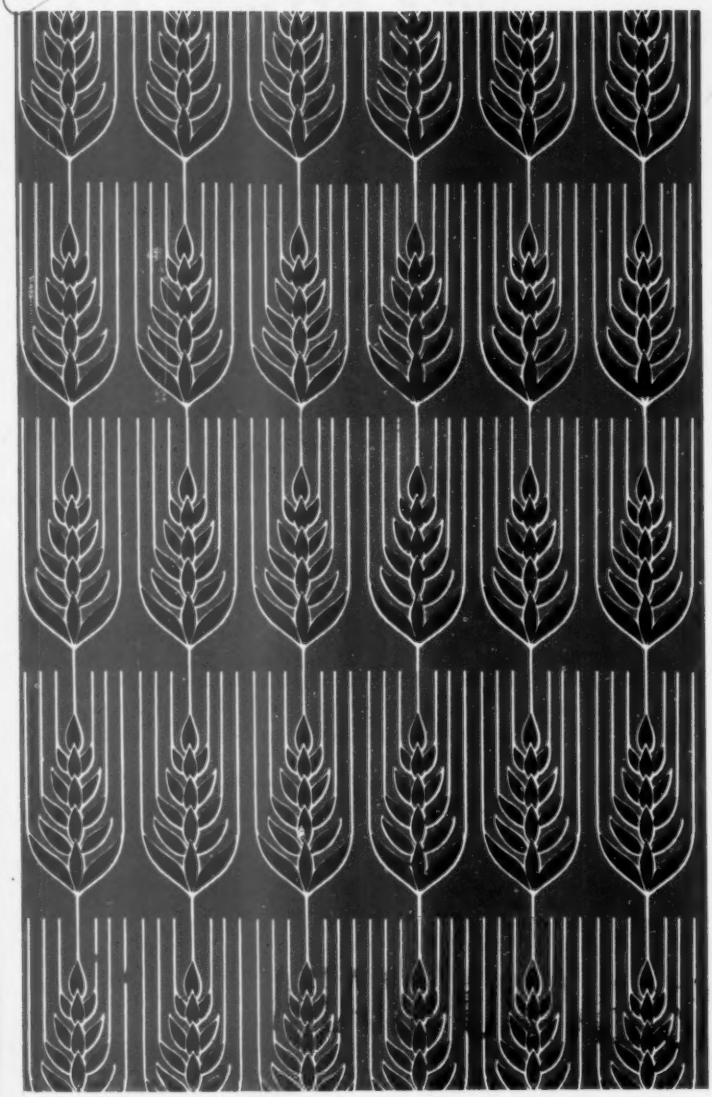

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Wheat Sales to Communist Nations
Outlook for 1967-68 Winter Wheat
Dutch Bread Production

Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

FOREIGN AGRICULTURE

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Communist Countries Take Less Wheat From Free World

By JAMES P. RUDBECK
Grain and Feed Division, FAS

Free World exports of wheat and flour to Communist nations dropped to 400 million bushels in fiscal year 1966-67. This 4-year low followed record high shipments of 765 million bushels in 1965-66. Reasons for the sharp decline were an alltime high wheat harvest in the Soviet Union, above-average crops in Eastern Europe, increased wheat trade among the Communist Countries, and smaller shipments to Mainland China.

Canadian wheat exports to Communist countries, which have accounted for over 40 percent of Free World wheat moving to these countries since 1960-61, amounted to only 245 million bushels in 1966-67, compared with a record high of 335 million bushels the year before. Sales to Soviet Union declined by 92 million bushels.

Australian wheat sales to Communist nations—80 million bushels—were down 15 million bushels from the previous year. Exports to the Soviet Union dropped from 21 million bushels in 1965-66 to none in 1966-67.

U.S. wheat shipped to Communist countries amounted to 18 million bushels in 1966-67, down 40 million bushels. The decline resulted largely from smaller import needs in Yugoslavia.

Sharpest drop was in Argentina's wheat shipments to Communist nations, which declined to 13 million bushels from 167 million bushels in 1965-66. The 1966-67 shipments completed contracts signed in the preceding fiscal year.

French exports were 39 million bushels, off 41 million bushels from 1965-66. Most of the French exports completed contracts signed in 1965-66, with the exception of those to Poland.

Total Free World exports to the Soviet Union were 106 million bushels, down 193 million bushels from 1965-66. Shipments to all other Eastern European Communist countries (except Albania) and Cuba dropped 115 million bushels; these countries offset part of this decline by increased imports from the Soviet Union. In 1966-67, Bulgaria became a net exporter of wheat, and Romanian wheat exports to Free World countries increased sharply. Free World exports to the Sino-Asian bloc, mostly to Mainland China, at about 192 million bushels were down from 1965-66 but slightly above the average of the 4 preceding years.

Dip to continue in 1967-68

Present indications are that Free World wheat exports to this group of countries will decline again in 1967-68. Sales to date support this expectation, and production in Communist countries is again above average; also it is possible that intrabloc wheat trade will increase further.

So far in 1967-68, Canada has sold 75 million bushels to the Soviet Union and 78 million bushels to Mainland China, the lat-

FREE WORLD WHEAT EXPORTS TO COMMUNIST COUNTRIES, FISCAL YEARS 1961-67

Exporting country	Yugoslavia	Poland	USSR	Other E. Europe and Cuba	Mainland China[1]	Total	Share of Free World total
United States:	*Mil.bu.*	*Mil.bu.*	*Mil.bu.*	*Mil.bu.*	*Mil.bu.*	*Mil.bu.*	*Percent*
1960-61	14	41	--	2	--	57	34.8
1961-62	39	17	--	--	--	56	21.1
1962-63	45	20	--	--	--	65	22.3
1963-64	11	41	65	12	--	129	18.5
1964-65	50	2	2	(2)	--	54	11.6
1965-66	55	1	--	2	--	58	7.6
1966-67	12	6	--	--	--	18	4.5
Total	226	128	67	16	--	437	14.3
Canada:							
1960-61	--	2	8	13	31	54	32.9
1961-62	--	16	--	10	75	101	38.1
1962-63	--	14	--	4	62	80	27.4
1963-64	7	12	208	25	40	292	41.8
1964-65	--	18	36	65	70	189	40.5
1965-66	--	13	192	50	80	335	43.8
1966-67	--	17	100	34	94	245	60.8
Total	7	92	544	201	452	1,296	42.4
Australia:							
1960-61	--	--	--	--	47	47	28.7
1961-62	--	--	--	--	73	73	27.6
1962-63	--	--	--	--	79	79	27.1
1963-64	--	--	57	2	95	154	22.0
1964-65	--	--	32	--	84	116	24.9
1965-66	--	--	21	--	74	95	12.4
1966-67	--	--	--	--	80	80	19.9
Total	--	--	110	2	532	644	21.1
Argentina:							
1960-61	--	--	--	--	--	--	--
1961-62	--	--	--	--	3	3	1.2
1962-63	--	--	--	--	4	4	1.4
1963-64	--	1	(2)	3	36	40	5.7
1964-65	--	--	1	2	22	25	5.4
1965-66	--	4	81	(2)	82	167	21.8
1966-67	--	--	1	--	12	13	3.2
Total	--	5	83	5	159	252	8.3
France:							
1960-61	--	--	--	--	1	1	0.6
1961-62	--	--	--	--	7	7	2.6
1962-63	--	12	--	6	34	52	17.7
1963-64	--	13	5	5	8	31	4.4
1964-65	--	11	4	30	17	62	13.3
1965-66	--	26	5	44	5	80	10.5
1966-67	--	14	5	14	6	39	9.7
Total	--	76	19	99	78	272	8.9
Other:							
1960-61	2	--	--	1	2	5	3.0
1961-62	1	1	--	6	17	25	9.4
1962-63	1	5	--	2	4	12	4.1
1963-64	1	9	17	15	11	53	7.6
1964-65	1	17	(2)	2	(2)	20	4.3
1965-66	(2)	15	(2)	10	5	30	3.9
1966-67	(2)	(2)	--	8	--	8	2.0
Total	6	47	17	44	39	153	5.0

[1] Includes exports to North Vietnam, North Korea, and Albania. [2] Less than 500,000 bushels

ter to be shipped January through October of 1967. Although Canada still has long-term sales agreements with Poland, Bulgaria, and Czechoslovakia, apparently no contracts have been made with these countries for shipment this year.

France has sold Poland about 9 million bushels under a long-term agreement, and there are reports that Common Market authorities in Brussels have approved export subsidies for a sale of 22 million bushels of French wheat to Mainland China. Australia sold Mainland China 56 million bushels of wheat for delivery during the period from July to December 1967.

U.S. sales for 1967-68 to date include about 10 million bushels to Yugoslavia and 1 million bushels to Poland—all on commercial terms. Both Iran and Spain have made small sales of wheat to the Soviet Union this year.

Including the Canadian sale to China, which extends beyond the 1967-68 marketing year, Free World sales to the Communist nations for 1967-68 shipment totaled roughly 260 million bushels as of early January 1967.

Forecast for 1968—
Record World Production of Oils and Fats

The world production of vegetable, animal, and marine oils and fats, essential for both food ingredients and industrial uses, has increased steadily for the last 9 years. In calendar year 1968 oils and fats are expected to set a new record—40.8 million short tons, or about 1.5 million more than in 1967.

The increase will not be uniform for all categories of oils and fats or for different products within categories. For example, 80 percent of the expected increase is in edible vegetable oils. Production of industrial oils, on the other hand, is expected to decrease about 10 percent. Tonnages of palm oils, animal fats, and marine oils will probably be fairly stable and are expected to rise only 3 percent, 2 percent, and 1.6 percent, respectively.

Within the category of edible vegetable oils, the greatest increase in 1968 production, 545,000 short tons, is anticipated in peanut oil because of the 1967 record peanut crop. India's 1967 harvest, after 2 years of reduced crops because of drought, swung up sharply. The remainder of the increase can be attributed mainly to large 1967 crops in Senegal, South Africa, and possibly Mainland China. The next largest increase, 340,000 short tons, is expected in soybean oil and will be mainly due to the record 1967 U.S. soybean crop. Cottonseed oil production in 1968 may be moderately above the reduced output of 1967—205,000 short tons more. Sharp declines in U.S. production will be offset by increases in other countries. Sunflowerseed oil production is expected to be 100,000 short tons more this year than last because of a substantial increase in the 1967 Argentine crop.

The only two edible vegetable oils for which decreased production is forecast are sesame and safflower oils. Sesame oil will be in shorter supply chiefly because of drought-reduced crops in India (the world's largest producer) and political disturbances in Nigeria's main growing area. Reduced safflowerseed production in 1967 in the United States, the principal grower, and in Mexico will offset gains in Spain and Australia.

Tonnages of the various palm oils produced in 1968 are expected to be greater than in 1967 but significantly below the record amounts of 1966.

Industrial oils production is expected to fall 162,000 short tons below the reduced level of 1967. The largest tonnage reduction will be in linseed oil. The world harvest of flaxseed in 1967 was the smallest in more than two decades, and crops declined from the previous year in all major producing countries except the Soviet Union. Tung oil production will probably be down 18 percent from last year's large supply. Much of the decline will be because of reduced output in Mainland China, but production from Argentina, Paraguay, and the United States is also expected to drop sharply.

In animal fats production, little change is anticipated in butter manufacture, but record quantities of lard are in prospect for 1968 with most of the gain in Western Europe. Grease and tallow output may also set a new record because of increases in EEC countries, Australia, New Zealand, Canada, and the United States.

World production of marine oils is expected to increase chiefly because of more fish oil output, partly due to improved methods of processing catch. Production of whale oil, other than sperm whale oil, will probably continue its downward trend because of the reduced Antarctic quota set by the International Whaling Commission.

ESTIMATED WORLD PRODUCTION OF OILS AND FATS

Commodity	1966	Preliminary 1967	forecast 1968
	1,000 short tons	*1,000 short tons*	*1,000 short tons*
Edible vegetable oils:[1]			
Cottonseed	2,750	2,410	2,615
Peanut	3,190	3,265	3,810
Soybean	5,000	5,300	5,640
Sunflowerseed	2,995	3,450	3,550
Rapeseed	1,520	1,600	1,620
Sesameseed	590	580	570
Safflowerseed	240	285	275
Olive oil[2]	1,340	1,345	1,360
Corn oil	270	265	270
Total	17,895	18,500	19,710
Palm oils:			
Coconut	2,550	2,425	2,500
Palm kernel	415	350	350
Palm	1,410	1,300	1,350
Babassu kernel[3]	73	74	76
Total	4,448	4,149	4,276
Industrial oils:[1]			
Linseed	1,255	1,075	920
Castor	380	305	320
Oiticica	20	8	15
Tung[4]	140	158	129
Total	1,795	1,546	1,384
Animal fats:			
Butter (fat content)	4,660	4,700	4,700
Lard[5]	4,405	4,520	4,700
Tallow and grease	4,470	4,570	4,700
Total	13,535	13,790	14,100
Marine oils:			
Whale	125	105	95
Sperm whale	161	160	160
Fish (including liver)	1,001	1,020	1,050
Total	1,287	1,285	1,305
Estimated world total	38,960	39,270	40,775

[1]For U.S., actual oil produced plus oil equivalent of exports; for others, based on estimated normal crushings from domestic production. [2]Excludes sulfur oil. [3]Mill production only. [4]Includes revised estimates for Mainland China. [5]Rendered lard only in most countries.

Japan Boosts Its Lagging Beef Production

By LEON G. MEARS
Assistant U.S. Agricultural Attaché, Tokyo

As Japan's economy continues to grow at a spectacular pace, its population is demanding more of most of the foods historically associated with affluence. Yet annual beef consumption per capita—only 3 pounds— is but a fraction of that of other developing countries. Furthermore, it is declining, a trend in sharp contrast to the traditional positive relation (in certain developed countries) between beef consumption and a rising standard of living.

Although this paradox might seem to indicate that the Japanese don't care much for beef, nothing could be further from the truth. Their appetite for beef is so strong that they will pay per pound $5.04 for tenderloin steak, $2.52 for beef eye round, $1.39 for chuck roast, and $1.26 for hamburger. They will pay these prices when pork chops are selling at $1.26 per pound and whole broilers for $0.63 per pound.

The explanation is that beef supplies even at these prices are inadequate to supply the growing beef hunger. To improve this situation, the Japanese Government is now making an all-out effort to spur domestic beef production.

Why beef is in short supply

Farm mechanization is at the root of the shortage of domestic beef. The traditional source of beef animals, draft cattle, has declined appreciably since most farmers have replaced these animals with small hand tractors. Numbers of beef and draft cattle have declined in each of the past 11 years—from a peak of 2.7 million head in 1956 to 1.55 million head as of February 1, 1967. Consequently, beef production has dropped sharply during this time, particularly since 1964.

Even though demand for beef at world prices has far exceeded the domestic supply, imports have not been allowed to fill the gap. Beef imports are rigidly controlled under the import quota system. The government has been reluctant to issue larger quotas because of heavy pork supplies and the belief that imports would disrupt plans to develop the local beef industry.

Since the increase in imports has not equaled the decline in production, total supply available for consumption has been going down. Practically all beef imports to date have been of lower grades from Australia and New Zealand.

The drop in domestic beef production and the rise in beef imports over the past 4 years are shown below:

Year	Beef production	Beef imports
	Metric tons	*Metric tons*
1964	214,468	6,200
1965	206,912	10,814
1966	149,550	13,493
1967 (preliminary estimate)	125,000	14,500

The scarcity of high-quality beef for use in such favorite dishes as sukiyaki and shabu-shabu is being keenly felt by consumers, who are voicing their feelings loud and clear. As a result, several of the 15 trading company members of the Meat Importers Council—the only group authorized to import meat—are planning to step up their imports of high-quality beef.

Spurring domestic beef production

The government is working to increase Japanese beef output both by expanding cattle numbers and increasing the efficiency

Small tractors, such as the one below, have figured in Japan's shortage of domestic beef by replacing draft cattle, traditional source of beef animals.

Japan's programs to expand beef output are expected to increase the demand for imported breeding stock—like the U.S. Aberdeen Angus bull being inspected by Japanese veterinarians above and the U.S. Herefords feeding in Hokkaido below.

of animals fed. This drive is part of the overall government program to supply more animal-protein foods for the consumer. Also, farm income generally has not kept pace with nonfarm income—a serious problem that diversification into the livestock field is expected to alleviate.

Programs underway to expand beef production include: Forage crop and pasture-improvement projects; establishment of government beef cattle breeding centers; feeding trials at State and Federal experiment stations; cattle loan programs; government imports of breeding stock; and research and extension-type services for cattlemen. Many farmers have responded positively to these programs, as evidenced by the fact that beef cattle numbers have been relatively stable in the last year or so. From now on they are expected to increase.

Government livestock officials now believe that the greatest opportunity for expanding local beef production in a hurry lies in the feeding of dairy bull calves. Unlike beef cattle, dairy cattle have been increasing in number rapidly in recent years; as of February 1, 1967, they totaled 1.38 million head. Over 90 percent of the dairy animals in Japan are Holsteins, which gain weight rapidly and produce the large carcasses that command a premium in this country. In the past, almost all the dairy bull calves have been slaughtered for sausage or for other purposes shortly after they were born. Only a small number of the best bull calves are needed for breeding purposes because artificial insemination is practiced in breeding about 98 percent of the dairy cattle.

Hokkaido's Holstein-feeding program

The government of Hokkaido Prefecture—the large northernmost island of Japan—is planning to launch a comprehensive program in the near future to feed Holstein steers; other prefectures are expected to follow this example.

Hokkaido is by far the most important dairy prefecture, accounting for about 30 percent of Japan's milk production. In contrast to the rest of Japan, a significant portion of Hokkaido is yet to be developed. Local officials believe the areas not presently in use are better suited to livestock raising than to other kinds of agricultural production because of the short season.

According to Hokkaido agricultural officials, there are about 340,000 head of dairy cattle in the prefecture at present, but only about 12,000 head of beef cattle. Their goal is to double dairy cattle numbers and to increase beef cattle to 50,000 head by 1972. In addition, they expect local cattlemen to be raising 150,000 Holstein steers by that time, 60,000 to be fed out locally and 90,000 to be sold to feedlot operators near Tokyo, Osaka, and other major beef markets.

One large Hokkaido feed manufacturer who has conducted feeding trials with Holstein steers has reported a "profit" of 50,000 yen (about US$139) on each animal fed. This profit incentive, plus strong government support, is expected to result in widespread feeding of Holstein steers before long.

The beef-expansion programs currently underway are expected to increase consumption of imported feedgrains and create a large market for beef breeding stock.

The program to feed male dairy calves that is now taking hold and gaining momentum is one that the Tokyo office of the U.S. Feed Grains Council has been promoting for some time. Several U.S. beef cattle associations have recently been actively promoting breeding stock exports to Japan. While these efforts have already resulted in increased sales, the big increase is likely to come in the next 2 years.

Although Japan's Ministry of Agriculture and Forestry has issued import licenses only for purebred cattle, many MAF officials and cattlemen favor the importation of high-quality commercial beef heifers also. They argue that only in this way can the beef industry be expanded rapidly at reasonable cost. The MAF is currently studying this issue, and it appears that such imports will be authorized before long.

FAO Promotes 1970 World Agricultural Census

Agricultural exporters and others engaged in developing foreign markets for farm products will find an important working tool in the 1970 World Census of Agriculture now being planned and promoted by the Food and Agriculture Organization of the United Nations.

Between 1968 and 1973, most of the 116 members of FAO, as well as other countries among the 122 in the United Nations, will conduct intensive surveys of agricultural production, population, and employment; land holdings and utilization; use of power and machinery on farms; transport of products from farms; irrigation and drainage; fertilizers and soil dressings; wood and fishery products; and association of agriculture with other industries.

Statistics will be collected for a single agricultural year. To insure that the information will be comparable, FAO has asked participating countries to take the survey in 1970 or as close to that year as possible. A detailed outline of material to be included has been distributed.

Although the census will not include import and export data, it will be valuable to traders in determining the supply and demand situation in the participating countries. Nations are being asked to report all crop area—both irrigated and nonirrigated—production of principal crops, and numbers of all livestock and poultry by size of land holding. The survey of transport facilities will be helpful in gaging the efficiency of a country's food distribution system—an essential element in planning shipments and storage. On the demand side, statistics on the size of holdings, use of machinery, population, and agricultural income can help determine a nation's ability to buy both farm products and the inputs—like fertilizer and equipment—necessary to produce them domestically.

Requests for data have been broken down into a Short List and an Expanded List of items. Those on the former are considered of major international significance; all countries are expected to include them if possible and applicable. Items on the Expanded List are either primarily of regional importance or breakdowns of items on the Short List.

A census of this magnitude will require personnel trained in the techniques of information gathering—both by complete enumeration and by sampling. Recognizing this need and the scarcity of such personnel in many developing countries, FAO and the U.S. Government have set up a training program in Washington, D.C., whereby 250 people from 70 nations will study techniques for carrying out an agricultural census. Participants will be instrumental in planning and executing the agricultural census in their countries and in training others to carry out this work.

U.S. officials have also recognized the need for continuing emphasis on agricultural statistics in developing countries. New P.L. 480 "self-help" agreements are requiring these countries to undertake "measures to strengthen systems of collection, cumputation, and analysis of agricultural statistics."

Outlook for Winter Wheat in 1967-68

Combined acreage planted to winter wheat in Western Europe and North America for harvest in 1968 does not quite reach the high level of 1966-67. But acreage is a good size—about 8 percent above the average area in the early 1960's, and crops are generally in better shape now than at this time a year ago.

Winter wheat acreage of Western Europe is expected to increase 5 percent over last year's, and Mexico again has a large wheat acreage. However, the United States, under acreage allotments, reduced winter wheat more than 4 million acres.

West Europeans increase acreage

Acreage planted to winter wheat in countries of Western Europe is up an estimated 2 million acres above that of the 2 preceding years. But prospects show that it will not reach acreage planted for harvest in 1965. Total area planted appears to be back at the average level during the 5 years ended 1964.

Acreage increases are the rule this year in the northern countries of Western Europe. Wheat crops as of February 1 were generally in better condition than those a year earlier. Weather and soil at the outset of autumn planting were favorable for seeding. Then conditions altered, but by late January severe weather over large parts of the Continent had failed to cause material damage to the wheat.

Accumulated wheat surpluses caused Spain and Greece—two countries with relatively large wheat acreages—to try diverting wheat acreages to other crops. Portugal's acreage is threatened by dry weather.

Weather permitted farmers of the EEC countries to increase winter wheat acreage by more than 1 million acres. Total estimated acreage approximates the acreage for the 1965 harvest and is 9 percent larger than the relatively small acreage of 1966-67. Crops as of February 1 were generally in good condition.

Winter wheat planted in *France* as of January 1 was estimated at 9,464,000 acres (up 7 percent from the January 1, 1967, estimate of 8,846,000 acres and 2 percent above the average). Crop conditions so far have been favorable and the outlook is satisfactory.

WHEAT (WINTER AND SPRING) ACREAGE OF WESTERN EUROPE

Country	Average 1955-59	Average 1960-64	1965	1966	1967
	Million acres	*Million acres*	*Million acres*	*Million acres*	*Million acres*
EEC:					
Belgium	0.50	0.51	0.56	0.53	0.49
France	10.43	10.46	11.17	9.86	9.72
Germany, West	3.06	3.43	3.49	3.43	3.50
Italy	12.15	11.00	10.60	10.56	9.91
Luxembourg	.05	.05	.05	.04	.04
Netherlands	.25	.33	.39	.37	.38
Total EEC	26.44	25.78	26.26	24.79	24.04
Other Europe:					
Austria	.63	.68	.68	.78	.78
Greece	2.70	2.70	2.78	2.52	2.32
Portugal	2.01	1.75	1.55	1.21	1.61
Spain	10.73	10.25	10.51	10.38	10.55
Sweden	.83	.68	.68	.47	.62
United Kingdom	2.10	2.06	2.54	2.24	2.31
Other countries	1.14	1.48	1.43	1.14	1.28
Total Europe	20.14	19.60	20.17	18.74	19.47
Total	46.58	45.38	46.43	43.53	43.51

[1]Preliminary.

Source: "Breadgrain Crop Approximates 1966 Record," *World Agricultural Production and Trade: Statistical Report*, January 1968.

Fall conditions in *West Germany* were good for planting winter wheat. Farmers at the outset intended to increase acreage by 5 percent over that of 1966-67, resulting in an estimated 3,186,000 acres, compared with the 3,034,000 planted in 1966. Plants at the end of January were surviving the severe winter well and sprouting successfully. Spring wheat acreage may be down 7 percent.

If plans materialize, *Italy* will harvest a record wheat crop in 1968. Farmers planted a high level acreage, substantially larger than last year's, which had been sharply reduced because of the heavy November floods. Favorable EEC guaranteed prices to producers boosted by 20 percent the durum acreage in southern Italy, Sicily, and Sardinia. Generally, wheat was planted under good conditions, with adequate snow cover protecting planted wheat. As of February 1, conditions remained good for crops.

Intended production of the *Netherlands* and *Belgium-Luxembourg* was not expected to change much from the high 1967 level. In late January, crops were in satisfactory condition.

Wheat acreage of the *United Kingdom* is up sharply from the preceding year and could exceed the high-level acreage for wheat in 1965, which produced a record crop. Winter acreage sown (as of December 4) was estimated at 1,677,000 acres, up 25 percent from the preceding year. Weather was favorable into January, when heavy snowstorms over large areas failed to materially damage crops. Two-thirds of the acreage is in winter wheat.

Acreage in *Greece*, again restricted to a below-average area, may equal or exceed the already reduced level of 1966-67. It is too early to tell whether crop conditions will be as favorable as in the two preceding good wheat years, 1965-66 and 1966-67.

Seedings of winter wheat in *Sweden* may be smaller than in fall 1966 due to heavy rains during the planting period. Snow was adequate to protect the crops in late January, but much would yet depend on later thawing, late frosts, and ice.

Mild autumn weather in *Austria* well into November permitted cultivation of winter crops in good time with no acreage cuts

One measure by which *Spain* is endeavoring to decrease wheat acreage is the reduction of producer prices in favor of feedgrains. Another factor tending to reduce prospects for a large crop is the weather, which in January was dry over most of the country. However, rain in the next few weeks could revive the growth of what appeared in mid-January to be promising crops.

In *Portugal*, moisture was sufficient to put soils in good shape for sowing and germination of seeded areas well into December. But drought in much of January threatened the wheat. It was hoped plantings would be relieved by rains in February.

U. S. winter acreage reduced

Acreage seeded to winter wheat for all purposes in the *United States* on December 1 was officially reported at 49.7 million acres, down 8 percent from the comparable estimate of 54.3 million in the year before. New acreage represents over half the combined winter wheat acreage of Western Europe and North America. As of February 1, moisture supplies in the U.S. winter wheat belt were considered ample to carry the crop into early spring. Due to better crop conditions, the 1968 harvest could match 1967's.

Wheat, among other crops, is the reason behind *Mexico's* continued expansion of irrigated farmland. Adequate irrigation water from the plentiful rains of last season are expected to insure a good crop in late 1968. Continued planting of new, high-yielding varieties should also help to increase the country's wheat outturn.

L. THELMA WILLAHAN
Grain and Feed Division, FAS

California Seed Firm Earns Presidential "E"

Secretary of Agriculture Orville L. Freeman presented a Presidential "E" Award last month to H. W. Walcott & Co. Inc., of San Mateo, Calif., for expanding foreign markets for U.S. farm products. Herbert W. Walcott, president of the company—growers, processors, and wholesalers of seeds—accepted the award along with R. A. Strehlke, head of the company's international division.

The firm's exports of certified California seed have more than tripled since 1965, amounting to more than 35 percent of the company's total sales.

The seed firm cooperates with the American Seed Trade Association's International Committee and with the Foreign Agricultural Service in export market development. Its representatives visit buying countries and attend international seed meetings.

The firm supplies seed samples of improved varieties to foreign countries for testing and evaluation and sometimes helps governments develop forage programs and seed industries.

The "E" Award includes a citation signed in the name of the President by Secretary Freeman and Secretary of Commerce Alexander B. Trowbridge.

The citation reads as follows:

"H. W. Walcott & Co. Inc. dramatically increased export seed sales from 1965 through 1967 by providing custom packaging, performing constant market research, easing credit terms, and using foreign language brochures extensively. The company pioneered in successful establishment of a seed certification program, and has been instrumental in creating acceptance of and demand for California certified seed in foreign markets. This farsighted and energetic export promotion program by Walcott reflects credit on management, employees, and the American free enterprise system."

"E" Awards are made cooperatively by the Departments of Agriculture and Commerce under a program announced by the President in 1961 to encourage the expansion of exports from the United States, to improve the balance of payments and to further U.S. responsibilities for advancing world freedom.

Recipients of the award are authorized to fly a blue and white "E" banner over their plants and offices, display their certificates of commendation, issue "E" lapel pins to employees, and refer to the award in advertising.

U.S. Farm Exports Up Under Barter

Barter contracts signed during the first 6 months of fiscal 1968 forecast a sharp increase in commercial exports of U.S. farm products under this program. New contracting from July 1 through December 31, 1967, was up 49 percent over that of the same period of 1966. The dollar value of contracts signed in the half year just ended was $168.9 million against $113.2 million for the same period a year earlier. All new contracts this fiscal year have covered procurements for which U.S. Government agencies would otherwise spend dollars overseas, so the entire contract value of almost $169 million will be reflected as balance-of-payment savings via the barter program.

Leading barter exports and major destinations during the first half of this fiscal year were wheat, $91.3 million (Brazil, Korea, Peru, and India); tobacco, $47.2 million (the United Kingdom, West Germany, and Malaysia); corn, $11.2 million (Canary Islands, Chile); and cotton, $10.1 million (Taiwan, the Philippines).

Supplies and services procured in exchange included cement, operation and maintenance of military installations, newsprint, and a nitroglycerin plant and related services for the U.S. Defense Department and urea fertilizer, cement, petroleum products, and asbestos for the Agency for International Development. Major recipient countries under the AID barters were Vietnam, India, Pakistan, and Laos.

U.S. Sandwich King on Japanese TV

The 1967 U.S. "Sandwich King" Robert L. Logan (in chef's hat) and his winning sandwich "Mexican Ambassador" were seen by approximately 10 million Japanese housewives recently on the popular daytime television program "Good Day Madam," a nationwide broadcast.

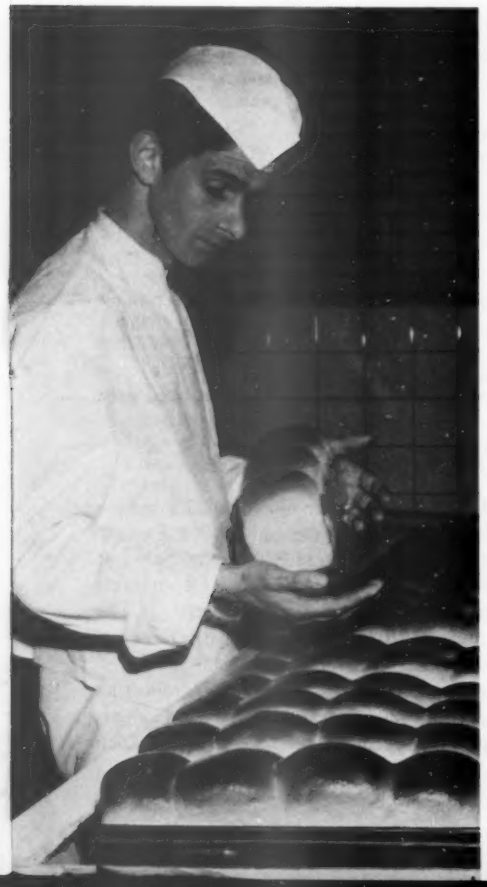
Logan's television appearance and subsequent national press coverage were arranged by the Tokyo office of Wheat Associates, U.S.A.—FAS cooperator for the promotion of U.S. wheat—currently campaigning to popularize sandwiches and other wheat foods in Japan.

Japan Buys Record '67 Tonnage of U.S. Wheat

U.S. wheat sales to Japan hit a new record during calendar 1967. Total U.S. sales were 2,269,000 metric tons, 239,000 over those of 1966. Significant in this picture is the fact that the U.S. increase was higher than the increase in total foreign purchases. Total wheat purchases from all sources in 1967 were 4,099,000 tons, an increase of 212,000 over those of 1966. The U.S. share of the market for 1967 was also higher at approximately 55.4 percent compared with the 1966 figure of 52 percent. A breakdown of U.S. wheat purchases for calendar 1967 follows:

Type	*1,000 metric tons*
Hard Amber Durum #2	17
Western White	790
Hard Red Winter 13%	485
Hard Red Winter 11.5%	325
Hard Red Winter Ordinary	357
Dark Northern Spring/NS 14%	291
Soft Red Winter #2	4
Total	2,269

Above, King Corn delivery truck completes its rounds in the Netherlands town of Delft. Quality-control is a chief ingredient in the King Corn success story. Below, baker checks over loaves just out of the oven before sending them to be sliced and wrapped.



Dutch Bakers Run Royal Campaign for King Corn

A group of Netherlands bakers have pooled their energies and advertising know-how in an all-out campaign to make American-style King Corn bakery products as familiar to Dutch housewives as tulips in the garden. Since King Corn bread, rolls, and donuts are made mostly from U.S. wheat (and say so on the wrapper), Great Plains Wheat and FAS have given the bakers a hand.

Initial efforts for King Corn were so successful, competing Co-op Netherlands and SABA bakers—together representing 182 bakeries—have added American-style bread lines and launched their own campaigns with help from GPW-FAS. The three organizations supply 60 percent of the bread consumed in the Netherlands.

Small start in Rotterdam

King Corn bread was introduced in Rotterdam in 1961 as a sandwich loaf and became a local success. In 1962 bakers there and in other Netherlands cities formed the SITOS organization and started producing the loaf.

That year Great Plains Wheat and FAS stepped in to help promote American-style King Corn donuts made of flour milled with at least 50 percent U.S. wheat. The successful conclusion of this promotion prompted SITOS to develop a special line of products exclusively for promotion under the King Corn label. GPW-FAS then helped SITOS expand its promotion program.

A new King Corn white bread called "Zweeds" was introduced in 1965 on the 20th anniversary of the Netherlands' freedom from World War II occupation. The bread was named for the Swedish people, who in 1945 sent American flour to the Netherlands through the Swedish Red Cross. A nationwide introductory campaign tied in with a membership drive for the Dutch Red Cross made "Zweeds" an overnight success.

Fast-growing sales of the King Corn line generated a number of requests from independent bakeries all over the Netherlands for contracts to produce King Corn products; SITOS issued 12 new contracts in September 1965. These bakeries and the 3 which have since joined produce King Corn nationwide.

Last year seven new King Corn bread products were introduced and the promotion program expanded once more. Products are: a new size "Zweeds," whole wheat "Stout," two types of family packs of sliced raisin bread, and pre-cut 6-packs of King Corn plain buns, raisin buns, and rolls. The new products were heavily advertised and some new media was adopted for the entire campaign. Advertising went on television January 1, 1967.

Twice as much U.S. wheat

Reports on the results of the 1966 King Corn campaign indicate American wheat was used almost exclusively for its products. This increase from the original agreement of at least 50 percent was due to excellent results in the initial campaign and competitive prices for U.S. wheat. The major mill supplying King Corn more than doubled its 1965 shipments in 1966.

While King Corn products were growing more and more popular, competitors asked Great Plains Wheat and FAS to help them get their own campaigns off the ground. The GPW-FAS third-party agreement was the same—products must be made of at least 50 percent U.S. wheat. Co-op Netherlands, which represents 2 flour mills and about 90 bakeries, initiated a promotion in 1965 with GPW-FAS for its American-style bread "Amerikaantje." Soon after, the SABA baking organization, which represents 92 independent bakeries, started promoting "Bums."

Co-op's advertising campaign used newspapers, national women's magazines, store placards, and other special material. Production levels at the close of the campaign speak for its success. In 1965 average flour usage per week was 600 sacks (110 lb.); in 1966 flour consumption increased to 1,500 sacks weekly, and during the first 3 months of 1967 usage averaged 3,000 sacks a week.

During the campaign Co-op replaced the label "Produced by Co-op Bakeries" with the new brand name "Juweel," thus allowing Co-op bread to be sold in outlets other than Co-op bakeries.

Important new legislation on bread distribution is expected to have a favorable impact on sales of all three organizations in 1968. Through 1967 bread distribution was carried out by the baking industry through house-to-house delivery and bakeries; only supermarkets had self-service bread counters. Since January 1, 1968, however, all grocery shops have been allowed to sell bread.

CROPS AND MARKETS SHORTS

Weekly Report on Rotterdam Grain Prices

During the period ending February 7, 1968, U.S. Hard Winter and USSR wheat prices increased 2 cents per bushel, while Argentine and U.S. Dark Northern Spring increased 1 cent. Prices for U.S. Soft Red increased 4 cents per bushel and Canadian wheat was unchanged.

U.S. and South African corn prices were unchanged. Argentine prices declined 1 cent per bushel.

Following is the listing of the week's Rotterdam prices:

Item	Week ending		A year
	Feb. 7	Jan. 31	ago
	Dol. per bu.	*Dol. per bu.*	*Dol. per bu.*
Wheat:			
Canadian No. 2 Manitoba	2.04	2.04	2.23
USSR 121	1.93	1.91	(1)
U.S. No. 2 Dark Northern Spring, 14 percent	1.94	1.93	2.05
U.S. No. 2 Hard Winter, 12 percent	1.82	1.80	1.91
Argentine	1.81	1.80	1.93
U.S. No. 2 Soft Red Winter	1.78	1.74	1.89
Corn:			
U.S. No. 3 Yellow Corn	1.39	1.39	1.60
Argentine Plate	1.60	1.61	1.82
South African White	1.47	1.47	(1)

[1]Not quoted.

Note: All quotas are c.i.f. Rotterdam and for 30- to 60-day delivery.

High-Quality Australian Wheat

Chairman H.C. Hodgson of the New South Wales Grain Elevators Board has indicated that this year's wheat harvest was of excellent quality—very dry and in good condition.

Of the 69 million bushels received by the Board, 53 million bushels are expected to be classed as Fair Average Quality, 12.5 million bushels as Hard Premium, 1 million bushels from irrigated areas as Soft Premium biscuit type, and 2.5 million bushels as off-grade.

Four million bushels of the current crop wheat have moved into Victoria, with the balance remaining on farms. There may be some late deliveries to the Board.

U.S. Vanilla Bean Imports Drop

Reflecting continued inventory reduction, U.S. vanilla bean imports in 1967 totaled 1.28 million pounds valued at $5.6 million, down 31 percent from imports of the year before and well under 1965 imports of 2.16 million pounds.

U.S. vanilla bean purchases during 1967 fell well under the amount agreed upon under the marketing quota arrangement between the Malagasy Republic and the U.S. Vanilla Bean and Flavoring Extract Manufacturers Association. This agreement called for a 1967 export quota allotment to the United States of 1.87 million pounds at an f.o.b. price of $4.63 per pound. However, under the agreement, any unsold portion of the quota would be automatically cancelled without penalty.

U.S. vanilla imports from the Malagasy Republic (including Reunion and Comores) in 1967 amounted to 1 million pounds, 870,000 short of the agreed quota allotment.

Indicative Prices for Hard Fibers

It is reported that at the recent Hard Fibers FAO meeting in Rome, representatives of some 26 producing and consuming countries recommended that an indicative price per long ton of East African No. 1 sisal be set at $205.80. They also recommended that manila hemp, presumably Davao I, be set at $360 per long ton. It was also agreed that exports of sisal and henequen fibers and cordage should total no more than 640,000 long tons in 1968.

Meat Imports Subject to Quota

U.S. meat imports subject to quota restrictions were 894.9 million pounds in 1967. This level of imports was 9 percent greater than for the same period a year earlier.

Meat imports subject to provisions of the Meat Import Law for 1968 have been estimated at 900 million pounds. This estimated level of imports is slightly above actual imports in 1967, but is well below the estimated quantity which would require the President to invoke quotas on meat imports. The adjusted base quota for 1968 is 950.3 million pounds. The estimated level of imports which would trigger imposition of quotas is 1,045.3 million pounds.

U.S. IMPORTS OF MEAT SUBJECT TO MEAT IMPORT LAW (P.L. 88-482)

Imports	Dec.	Jan.-Dec.
	Million pounds	*Million pounds*
1967:		
Subject to Meat Import Law [1]	72.4	894.9
Total beef and veal [2]	77.0	979.1
Total red meat [3]	116.3	1,358.7
1966:		
Subject to Meat Import Law [1]	66.0	823.4
Total beef and veal [2]	72.6	893.3
Total red meat [3]	102.4	1,273.0
1965:		
Subject to Meat Import Law [1]	53.7	613.9
Total beef and veal [2]	61.4	700.9
Total red meat [3]	95.4	1,010.7

[1]Fresh, chilled and frozen beef, veal, mutton and goat meat.

[2]All forms, including canned and preserved. [3]Total beef, veal, pork, lamb, mutton and goat.

U.S. Soybean and Products Exports

December exports of U.S. soybeans amounted to 27.2 million bushels—down 2.6 million from those of December 1966. Exports to the EEC of 11.9 million bushels were 900,000 bushels less than shipments in 1966. A number of other major U.S. markets also took less, but exports to Spain and Denmark were up. The September-December total of 107.2 million bushels, however, maintained an increase of almost 2 percent over last season.

Soybean oil exports dropped to 56.5 million pounds, reflecting smaller shipments under P.L. 480 programs. Cottonseed oil exports amounted to only 4.0 million pounds, over half of which

went to Venezuela. For the October-December quarter, total vegetable oil exports of 284.4 million pounds were 25 percent above the 228.4 million exported a year earlier.

U.S. EXPORTS OF SOYBEANS, EDIBLE OILS, OILCAKE AND MEAL

Item and destination	Unit	December 1966[1]	December 1967[1]	Sept.-Dec. 1966-67[1]	Sept.-Dec. 1967-68[1]
SOYBEANS					
Belgium	Mil. bu.	1.0	.8	3.5	4.1
France	do.	.3	0	.6	.3
Germany, West	do.	4.3	4.5	13.6	14.8
Italy	do.	1.3	1.0	7.3	6.7
Netherlands	do.	5.9	5.6	16.1	18.6
Total EEC	do.	12.8	11.9	41.1	44.5
Japan	do.	4.8	4.6	24.2	23.5
Canada	do.	4.1	3.1	13.2	11.7
Spain	do.	2.1	3.2	7.9	9.3
Denmark	do.	2.1	2.2	6.3	6.5
Taiwan	do.	1.8	1.2	2.3	3.6
Others	do.	2.1	1.0	10.3	8.1
Total	do.	29.8	27.2	105.3	107.2
Oil equivalent	Mil. lb.	326.8	298.6	1,156.7	1,176.7
Meat equivalent	1,000 tons	699.5	639.1	2,475.6	2,518.5
EDIBLE OILS		December		Oct.-Dec.	
Soybean[2]	Mil. lb.	1966[1]	1967[1]	1966-67[1]	1967-68[1]
India	do.	5.5	4.1	13.3	104.5
Pakistan	do.	(3)	0	(3)	37.3
Tunisia	do.	8.9	16.6	27.3	24.4
Israel	do.	5.7	2.6	11.5	18.9
Dominican Republic	do.	2.2	4.7	2.3	9.3
Vietnam, South	do.	0	3.5	5.9	8.3
Brazil	do.	1.7	5.6	2.2	8.2
Canada	do.	7	1.0	6.8	7.3
Afghanistan	do.	0	4.4	0	4.4
Hong Kong	do.	1	1.6	.1	4.3
Others	do.	80.7	12.4	141.5	42.4
Total		111.5	56.5	210.9	269.3
Cottonseed:[2]					
Venezuela	do.	2.8	2.8	8.3	11.3
Canada	do.	.7	.5	1.6	2.1
Germany, West	do.	0	.4	0	.4
Others	do.	1.8	.3	7.6	1.3
Total	do.	5.3	4.0	17.5	15.1
Total oils	do.	116.8	60.5	228.4	284.4
CAKES AND MEALS					
Soybean:					
Belgium	1,000 tons	14.6	75.6	47.8	105.2
France	do.	38.3	62.5	108.1	111.3
Germany, West	do.	50.0	35.7	136.0	157.6
Italy	do.	29.9	9.3	61.9	18.4
Netherlands	do.	36.7	42.9	91.4	105.1
Total EEC	do.	169.5	226.0	445.2	497.6
Canada	do.	15.8	21.2	67.4	61.6
United Kingdom	do.	7.2	2.2	33.8	28.9
Denmark	do.	12.3	12.8	27.2	24.9
Yugoslavia	do.	20.3	9.8	25.2	24.8
Hungary	do.	0	14.0	8.1	14.0
Others	do.	37.2	37.3	69.0	84.7
Total	do.	262,3	323.3	675.9	736.5
Cottonseed	do.	.4	.4	4.7	1.1
Linseed		7.0	4.5	60.2	63.2
Total cakes and meals	do.	271.1	331.2	744.5	810.7

[1]Preliminary. [2]Includes shipments under P.L. 480 as reported by Census. [3]Less than 50,000 pounds. [4]Includes peanut cake and meal and small quantities of other cakes and meals.

Compiled from Census records.

December soybean meal exports reached 323,000 tons—up 23 percent from the 262,300 tons exported in 1966. Most of the increase was in exports to the EEC, which amounted to 226,000 tons, compared with 169,500 in December 1966. The October-December soybean meal total rose to 736,500 tons—9 percent above last season's first quarter total. Countries taking more soybean meal this quarter and the amount of increase (in tons): Belgium, 57,400; Germany, 21,600; the Netherlands, 13,700; Hungary, 5,900; and France, 3,200. Exports to Italy fell a sharp 43,500 tons. Other countries taking less include Canada, the United Kingdom, Denmark, and Yugoslavia.

Total cake and meal exports amounted to 810,700 tons compared with 744,500 last season. While most of the gain was in soybean meal, slightly larger amounts of linseed and "other" cake and meal were also exported.

Hamburg's Prices on Fruits and Juices

Importers' selling prices shown below include duty and cover sales in lots of 50 to 100 cases. January and October 1967 quotations include turnover tax which expired December 31, 1967. January 1968 quotations do not include added value tax which became effective January 1, 1968.

Type and quality	Size of can	Price per dozen units: Jan. 1967	Oct. 1967	Jan. 1[1] 1968	Origin
CANNED FRUIT		*U.S. dol.*	*U.S. dol.*	*U.S. dol.*	
Apricots, halves:					
Not specified	2½	3.27	--	3.12	Spain
Do	2½		--	3.18	Greece
Peaches, halves:					
Choice, light syrup	2½	3.75	4.14	3.85	U.S.
Do	2½	3.72	--	3.54	S. Africa
Do	10	--	16.05	15.30	Australia
Not specified	2½	--	--	3.78	Italy
Do	2½	--	3.72	3.39	Greece
Pears:					
Not specified	2½	3.87	4.59	4.17	Italy
Do	10	--	12.60	13.05	Italy
Fruit cocktail:					
Heavy syrup	2½	5.10	5.94	5.64	U.S.
Choice, heavy syrup	2½	--	5.01	4.77	S. Africa
Do	2½	5.04	--	4.82	Italy
Do	10	--	--	20.10	Australia
Pineapple:					
Whole slices:					
Fancy	2½	--	5.16	4.92	U.S.
Do	2½	4.59	4.46	4.12	Philippines
Choice	20 oz.	3.30	3.33	3.15	U.S.
Do	2½	4.40	4.48	3.74	Philippines
Not specified	2½	--	4.35	4.14	U.S.
Do	20 oz.	--	--	2.26	Taiwan
Do	2½	3.48	3.39	3.30	S. Africa
Pieces and halves:					
Not specified	2½	2.97	2.88	2.64	Philippines
Do	2½	3.00	2.91	2.72	Taiwan
Crushed:					
Fancy	2½	2.91	2.91	2.76	U.S.
Do	10	--	14.46	13.71	U.S.
Do	10	12.06	12.06	11.52	Philippines
Not specified	10	--	9.75	8.97	Taiwan
CANNED JUICES					
Grapefruit, unsweetened	1 qt.[2]	--	4.14	3.99	U.S.
Do	43 oz.	4.11	4.05	3.48	Israel
Orange, unsweetened	1 qt.[2]	--	4.08	4.08	U.S.
Do	43 oz.	--	--	3.57	Israel
Do	43 oz.	3.87	3.57	3.51	Greece

[1]January 1968 quotations exclude added value tax of 10 percent for juices and 5 percent for other processed fruit effective January 1, 1968, and are not fully comparable to earlier quotations which include the now expired turnover tax. [2]Packed in glass bottles.

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Ontario Flue-Cured Prices

Sales of flue-cured tobacco at the auctions in Ontario, Canada, totaled 106.6 million pounds through January 26, 1968. The average price of sales through that date was 70.4 Canadian cents per pound. Last season, total sales for a comparable period were 117.2 million pounds at 72.7 Canadian cents.

1967 U.S. Cigarette Exports

U.S. exports of cigarettes in 1967 totaled 23,652 million pieces—up less than 1 percent from the 23,458 million shipped abroad in 1966. The value of 1967 exports was $116.2 million, compared with the $110.5 million shipped out by this country in 1966.

Major foreign markets for U.S. cigarettes in 1967 (in order of importance) were Hong Kong, Spain, the Netherlands Antilles, Paraguay, Kuwait, and Panama. Those six countries combined purchased 37 percent of the total exports.

U.S. EXPORTS OF CIGARETTES

Destination	1965	1966 [1]	1967 [1]
	Million pieces	*Million pieces*	*Million pieces*
Hong Kong	2,641.8	2,366.0	2,450.4
Spain	1,823.6	1,944.1	1,704.3
Netherlands Antilles	1,291.7	1,286.2	1,472.2
Paraguay	966.5	1,269.7	1,385.3
Kuwait	1,123.3	1,238.1	1,028.6
Panama, Republic of	651.4	624.2	759.3
Germany, West	522.8	653.4	720.5
France	1,034.6	968.7	719.7
Italy	643.9	622.4	714.7
Lebanon	630.4	498.4	639.9
Belgium-Luxembourg	511.2	398.9	593.9
Ecuador	712.4	641.9	561.7
Morocco	291.1	381.1	556.7
Canary Islands	486.6	568.1	545.0
Switzerland	483.0	538.5	538.3
Australia	468.6	451.6	524.1
Denmark	398.9	477.7	520.0
Singapore	[1]1,268.4	501.8	507.9
Japan	295.1	404.2	501.8
Netherlands	503.3	606.5	476.5
United Kingdom	283.6	329.1	353.2
Yugoslavia	189.0	337.9	348.2
Portugal	160.4	275.9	332.8
Canada	311.4	259.6	329.4
Mexico	111.3	190.0	295.4
Other	5,245.9	5,623.5	5,072.2
Total	23,050.2	23,457.5	23,652.0
	1,000 dollars	*1,000 dollars*	*1,000 dollars*
Value	105,297	110,507	116,211

[1]Preliminary. [2]Includes Malaysia.
Bureau of the Census.

Record Thai Cigarette Sales

Preliminary data indicate that sales of domestic-made cigarettes in Thailand reached a new high in 1967—nearly 12.2 billion cigarettes, compared with 11.1 billion in 1966 and 10.3 billion in 1965.

Use of U.S. tobacco in Thai factories also increased last year to a new record of about 18.5 million pounds, 15 percent larger than the previous year's total of 16.1 million pounds. The increase resulted from larger sales of cigarette brands containing high percentages of U.S. leaf. Prospects are that cigarette sales in 1968 will continue their sharp rise of recent years, with an accompanying gain in use of U.S. tobaccos.

Correction: February 5, 1968 issue, page 15, acreage reported in paragraph one of "Egyptian Cotton Production Declines" should read 1,850,000; average yield stated should be 519 pounds per acre.

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